Digital Marketing Institute

EMAIL MARKETING

Transcript

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EMAIL MARKETING

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LESSON 1: EMAIL MARKETING FUNDAMENTALS

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IMPORTANCE OF EMAIL MARKETING

Email is the original one-to-one digital marketing channel. It's so integrated into our lives that it's hard to imagine a time before it existed. People check their email multiple times a day on phones, computers, and other devices.

In fact, some of you probably check your email first thing in the morning, last thing at night, and will even check it during this course. People engage with email all the time. So, it's a great way to connect with customers at key points during the day. Email marketing is a commercial channel used by both B2B and B2C companies to deliver advertisements, offers, education, and other marketing content directly to a user's inbox.

Bear in mind, a user's inbox is one of the most private parts of the online experience. Many people can see your website, Facebook, and Instagram posts, but no one except you typically sees your email inbox. So, it's a very personal space and a great way to connect in a meaningful manner with consumers.

Email has not only stood the test of time as a marketing channel, but has experienced a renaissance of late, with the advent of smartphones allowing users to check email whenever and wherever they like, coupled with privacy issues on other channels like social media, email is seen by many consumers as a secure place where brands and organizations can communicate with them in a useful, effective way.

With more than 4.3 billion active internet accounts globally, 50% of the world's population is connected online and nearly everyone has an email address. In fact, study after study has shown that consumers overwhelmingly prefer email over all other digital and even offline marketing channels for company communications.

Sixty-four percent of decision-makers use email, and email marketing delivers an ROI at least three times higher than social media. Plus, it converts three times better than social. Its influence is most directly felt in e-commerce, evidenced by the fact that 44% of consumers who receive targeted emails acknowledged buying at least one item because of a promotional email message.

And finally, because of its low cost and high yield, email generates higher return on investment than any other marketing channel, as much as 42 to 1. Email is an essential channel in any marketing program. Indeed, it sits at the very center of omnichannel marketing for commercial, B2C sales, and B2B lead generation and nurturing.

When it's personalized, automated, and targeted, email marketing is one of the strongest conversion, lead nurturing, and sales channels, both offline and online. Email is a relatively inexpensive high-impact channel and typically has a highest ROI among all digital.

It is extremely effective for both customer acquisition, meaning qualifying leads and nurturing relationships with potential new customers, as well as for retention, generating direct sales, and growing loyal customers. There are many different types of email campaigns you might use to engage your customers from registration emails, to product updates, newsletters, and renewal notices.

These can be used to drive different types of audience engagement and can be understood according to the following five levels. The first level is foundational. This is baseline communication

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sent to your broadest audience. The types of messages at this level include newsletters, bulletins, holiday greetings, and company or product announcements. The second level is promotional, where the goal is to generate revenue or product demand.

The types of messages here includes sales and special offers, free trials, discounts, and holiday shopping. On the third level, known as informational, content plays an important role as you try to establish and grow relationships. This is where email campaigns that add value, like product-related education, how-tos, articles, and lead nurturing programs, exist.

The fourth type of email messages are engagers, which serve as special purpose to inspire response and interest in non-promotional, non-salesy ways. These types of campaigns are used to stimulate engagement with the channel and inspire comfort, familiarity, and interest among brand subscribers.

The types of campaigns here center around curiosity, community, and entertainment, like quizzes, games, and so on, feedback, surveys or reviews, or rewards such as offers for contests and sweepstakes. At the top level, we have one-on-one, automated email communications in which triggered messages are targeted to individuals based on their actions, inactions, or personal data.

These messages include a powerhouse of personalized campaigns like welcome, post-purchase thank you, upsell, exploration and loyalty status emails. As you examine this illustration, you'll notice that the higher the level, the more specific and automated email campaigns become. Also, there is an inverse relationship between audience segmentation and send volume.

The more personalized a campaign, usually the fewer people it is sent to, even just if to an audience of one. It's important to note that email campaigns do not have to be individually programmed and set up with every message. Emails can be sent to recipients automatically. This is called triggered email or marketing automation.

Typically, this is used to keep people in the loop about purchases, subscriptions, and specific interests that they've signed up for or to recognize and respond to key customer actions and milestones. Examples of automated emails include new subscriber welcome messages, purchase receipts, abandoned cart reminders, or form submission and content download confirmations.

To better understand the many types of automated emails, it helps to think of them in these five categories. Number one, functional. Two, behavioral. Three, personal. Four, sales lifecycle stage. And five, transactional.

A subscriber list is a list of people who have opted in to receive offers, promotions, news, or content. Remember, email is considered an inbound marketing channel as it is the consumers who reach out to your company and are effectively saying "I want to hear from you," when they subscribe. There are two main ways to collect and verify email subscribers with their explicit consent.

In other words, two methods for building a permission-based email list. The first is called single opt-in. This is where an individual subscribes to emails typically through a form on a webpage. A person enters his or her email address, name, and any other details required and is then added to the organization's email marketing list. The second way is called double opt-in.

When a person subscribes to emails by submitting an email address through a form or purchasing online, a confirmation email is returned. This confirmation email message contains a request to verify consent, usually by clicking a link in the message. Only after a subscriber has clicked a link in the verification message is their address verified and added to your list.

So, how do you choose the most suitable opt-in method for your email list? While single opt-in provides for a smoother user experience and offers rapid scale in list growth, it may not be sufficient for organizations such as financial services or healthcare, which are collecting sensitive information from their customers.

Companies in those industries might have a greater need to fully verify that the individuals signing up to receive their email truly want it and that those people are, in fact, the owners of the email addresses provided. The other disadvantage of single opt-in is, in the absence of good email address verification and hygiene practices during collection, individuals can submit bogus or incorrect data, which then causes deliverability problems later.

Double opt-in emails ensure that people are entering real email addresses, and this helps reduce the number of bots or fake accounts subscribing to your list. This way, you can ensure that you're collecting high-quality email addresses from real people.

You'll get lower subscriber numbers than with single opt-in, but there'll be higher quality and verified addresses. For this reason, double opt-in is a quality-over-quantity approach to email list building.

LEGISLATION AND REGULATIONS

Many countries have laws concerning what and how an email marketer is allowed to send. This is in order to reduce or eliminate unwanted, abusive, fraudulent, and other malicious types of email - often called spam.

You must recognize that email marketing regulations are in place to protect users from fraud and abuse, as well as give them control over their own email permissions. These regulations are essential for keeping data secure and protected from harmful use. If you are sending email to a worldwide audience, you must ensure each regulation is adhered to – regulations are not based on where you are sending the emails from, but where your subscribers are located.

There are four core pieces of legislation that every email marketer must be familiar with. They are GDPR, CCPA, CASL, and CAN-SPAM.

GDPR The European Union's General Data Protection Regulation was introduced in 2018. It requires strict user data and permission practices in relation to the collection and use of Personally Identifiable Information (known as PII). People must explicitly consent to receive marketing emails and consent to allowing website cookie tracking on their devices.

CCPA: Or California Consumer Protection Act, was introduced in early 2020. It is similar to the GDPR though not as far-reaching in some areas. Some interesting differences between CCPA and GDPR include opt outs to prevent companies selling your consumer data to third parties.

CASL: The Fighting Internet and Wireless Spam Act, aka the Canadian Anti-Spam Legislation, went into effect in 2014. This requires marketers to obtain permission from a user before they can send marketing material via email or SMS.

CAN-SPAM: The United States protects email users via this 2003 act, officially know as the Controlling the Assault of Non-Solicited Pornography and Marketing Act. It established certain mandatory opt-out practices and requires email senders to clearly identify themselves and the content of any marketing email.

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GDPR is the most far reaching and consumer-focused regulation and is the highest form of protection for consumers. Therefore, marketers really need to understand it. GDPR lays down these very clear directives.

- An email marketer may only send marketing emails to a user who has explicitly requested to receive that content.
- All personal user data must be protected at certain minimum standards of security and cannot be shared outside the EU without special approval from a tribunal.
- Users may at any time request to be informed of any and all information the sender has about them.
- Users may at any time request that a sender delete any and all personal information about them.
- GDPR applies to any company operating in or doing business with citizens of the EU, regardless of the company's physical location.

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LESSON 2: EMAIL MARKETING TOOLS AND STRATEGY

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EMAIL STRATEGY

An email strategy helps you market your products and services, taking into consideration who your target customers are, what they are looking for, and when the best time is to provide that information to them. For an email marketing strategy to be effective, you need to:

- Be mindful of the levels of email engagement as you start building out a full email strategy.
- Look at the levels of email messaging when you're building your strategy
- Identify where you have existing campaigns and where you might need new ones.
    - What could you send to leads or prospects – how about a lead nurturing offer?
    - What about new customers?

Segmentation is grouping similar users together and sending relevant content based on that criteria. There are different types of segmentation. Depending on the type of organization, B2B or B2C, you can segment your email recipients in different ways:

- Demographics – that is, gender, age, geography, education
- Job role, industry, or company type
- Purchase history
- Current or Potential Customer
- Stage in Sales Cycle
- Preferences or Interests
- Clicks, opens or content formats
- Change in engagement or behavior, for example, if they didn't complete a purchase (cart abandonment) or if they haven't opened one of your newsletters in a few weeks (inactivity)

When it comes to personalizing emails, you can get creative with email content, subject lines, and responsive design, creating unique experiences for recipients. For example:

- Address the customer by their name.
- Offer the customer a product recommendation.
- Display products based on their viewing history.

It is very important to be strategic about the timing of your email, and to make sure it delivers the right message at the right time. There are some steps you can take to ensure this:

- Use A/B testing to find the best send times for your audience.
- Identify optimal days for your campaigns.
- Take account of different time zones.

EMAIL SERVICE PROVIDERS

An Email Service Provider – or ESP – is a platform for managing all your email campaigns. Typically, ESPs are an online interface – like Mailchimp – where you can upload your email subscriber lists, segment these contact lists, build email templates, and then send and track your campaign performance.

Using an ESP means you don't need to have a server in your office to handle your emails; it's all done in the cloud. They are not intended for one or two email sends, but for lists of hundreds to millions of subscribers.

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Some of the great features of an ESP include:

- Contact database management, where the list of subscribers, email addresses, and other contact information is stored, making it easy to add, edit, and remove contacts as needed.
- Segmentation, because the contact database stores all of the information about your contacts on their personal profiles, the ESP can extract that data and use it to segment users.
- Personalization, again, because you have all of that data residing within people's profiles, you can then use the ESP to extract that information to create a personalized experience.
- Automation, allowing for repetitive tasks like sending a welcome email or sending a receipt, is perfectly manageable through an ESP, and a better alternative to sending an individual email every time.
- Tracking behavior, providing the data and insights regarding who opened and clicked the email, so you can improve your future campaigns.
- Critically, unsubscribe management deals with users who want to opt out from receiving your emails. This is very important when you consider the legislation we spoke about earlier. As a business, you need to be able to prove how a person opted in and opted out of receiving your emails on your site, should it go to court.
- Email and landing page creation, drag-and-drop builders, or WYSIWYG (What You See Is What You Get), allow you to quickly create and edit your emails or landing pages.

When they're used correctly, ESPs enable marketers and companies to design professional email campaigns and deliver useful content directly into their customers' inboxes resulting in a unique experience for the user, as well as more brand affinity and ongoing sales.

To help drive efficiency, ESPs can be used to send emails based on subscriber activity and list segmentation. These are called automated emails, triggered emails, or scheduled emails as they are sent based on rules and conditions, rather than by a person manually pushing the send button every time a subscriber or customer takes and action. Marketing automation and automated email help you stay connected to your customers every step of the way, and reduces repetitive tasks such as abandoned cart notifications or product recommendations, and email retargeting.

When you're thinking about which ESP you should choose, you should consider the differences between those used for personal or business communication and those used specifically for email marketing campaigns. Here are some of the most popular ESPs used for sending marketing and commercial emails:

- Mailchimp
- AWeber
- Constant Contact
- GetResponse
- HubSpot
- Eloqua
- Marketo
- Act On

Let's look at the reasons why you would choose to use an ESP instead of, say, an in-house email system.

- **Whitelisting of email broadcasts** to avoid spam filters. ESPs have agreements with other major email providers like Gmail and Yahoo and so on, that they will monitor email

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broadcasts and reduce spam. This is called whitelisting and can reduce the number of emails which end up in the Spam folder.
- **Custom domain** for email sends. ESPs allow you to send emails using your own website URL address.
- **Deliverability reporting**. Understand how many emails were sent to people's inboxes and how many bounced back due to the email address being incorrect or their inbox was full.
- **Unsubscribe and complaint handling**. ESPs automatically remove users who unsubscribe from your lists so you don't have to remove them manually

To keep your email list fresh and relevant, it's essential to monitor your email delivery, manage good list hygiene, and use double opt-in. By maintaining a healthy email list, you will always have a better chance of getting your emails delivered to those who need or want them.

When building subscriber or email lists, it's important to be aware of the types of lists that are available in order to identify different types of email lists:

- Opt-in
- Opt-out
- Purchased (We recommend you don't use this one)
- Rented or Shared (We also recommend you don't use this one)

List segmentation contributes to the growth and management of a contact database by keeping information about contacts (leads, subscribers, customers etc) up to date and accurate.

Email lists and contacts management yield better open rates and lower complaints or unsubscribes by focusing on the target segment of recipients. This is because you know what your subscribers like and can send them the content that is most relevant to them.

EMAIL LIST GROWTH AND MANAGEMENT

People often enter their email addresses on websites in return for something. This is the essence of lead generation, that is, collecting email addresses from people you hope to turn into customers.

By offering people something of value in return for their email addresses, you can follow up with them, explain the benefits of your product or company, and encourage them to purchase from you. Lead generation is an essential strategy in B2B sales and B2C marketing. Leads are people who could potentially become customers.

In complex purchase scenarios that require a person to have a conversation with a sales rep, lead generation is a core commercial strategy. Examples of leads being engaged by sales teams include business-to-business services, which might have a long sales cycle, multiple sign-off points for approval, and a large price commitment.

Engaging leads with quality content emailed to them at key points in the sales cycle can make it easier for sales teams to convert them into paying customers. This is called lead nurturing. It's an email process where sales cycles are shortened and prospects are more likely to buy as they have engaged with your email content and understand the value of the services you offer.

Examples of lead generation in the business-to-consumer world include products and services with a long sales funnel, such as insurance. When you request an auto insurance quote on a website and

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supply your email address, for example, this will eventually result in an insurance sales rep emailing or calling you with a quote and an offer to purchase the policy.

When it comes to collecting information for lead generation, remember to only ask for the details you need such as name, email address, purchase time frame, postal code, and phone number. Don't ask for information you might not need, like gender or full mailing address, and so on. There are many ways to capture email addresses for lead generation. For example, downloadable content like a white paper or e-book.

Offers for coupons and savings. Free trial of a product or service. Webinar training or virtual-conference registration. Likewise, there are many sources of data collection that provide information on new leads or potential customers.

Company website elements such as lightboxes and pop-ups. Gated content, where a person can only access content or an e-book after they've filled out a form and provided an email address. Social media can be a collection point. Partners and affiliates may also be collecting data for you.

Don't forget sales and customer-service reps or in-person at a physical point of sale. Plus, there's print and traditional media that can allow you to capture data as well. When you ask visitors to complete a form or a sign-up request on your website, you can collect numerous data points to get a picture of who they are.

Asking for just enough information to identify visitors as prospects, versus customers, and then, to further segment them by interest, preferences, or opportunity to your company allows you to more effectively communicate with subscribers in personalized relevant ways. And that generates better revenue and response.

Bear in mind, you should only ever ask for data that you actually need and plan to use. Otherwise, people will find online forms and subscription options cumbersome, too time-consuming to complete, and you'll end up collecting fewer email addresses because individuals will abandon before submitting.

Before writing, designing, and sending an email campaign, it's important to know who your audience is and ensure you're sending the right message to the right people. At this point, you can take a look at your typical buyer's journey. This journey consists of the multiple stages a buyer goes through before and after a purchase.

First, there's the awareness and interest stage. Buyer becomes aware of their need for a product or service and begins to look for providers that can fulfill it. Next is the consideration stage. After researching solutions and considering options, a buyer has developed a certain view on available products and is aware of his own personal preferences.

At the next stage, conversion, the buyer has selected the product or service he wants and has made a decision to purchase. And finally, at the retention stage, the buyer and brand build a strong enduring relationship. The buyer has become a customer and receives valuable information that can turn him or her into a true fan or evangelist of your brand.

So, what does the buyer's journey have to do with emails and your audience? When you correctly identify a subscriber stage in your customer journey, you can properly align your message, call to action, and offer to enhance relevancy and response.

Again, your goal is to reach the right person at the right time with the right content. For example, when it comes to a new prospect or customer at the awareness or interest stages, you might send a welcome email within the first 24 hours of someone subscribing and thank them for signing up. Let them know what they can expect from you. Next, you may consider sending regular promotions, content, updates, event invitations, or seasonal emails in order to move them down the buyer's journey.

And finally, at the retention stage, exclusive offers for the most engaged clients, product or service updates, cross-sell invitations, and loyalty or rewards programs will help retain and excite customers into becoming brand advocates. When using the buyer's journey to align your emails to the right people at the right time, you should always strive to manage or exceed the expectations of your audience.

Provide clear expectations on the volume and frequency of emails that will be sent when you send a welcome campaign after signup. Ensure that your subscribers see content that is useful and related to their stated interest. Be mindful that the conversation with subscribers has either just started or is being continued throughout each email.

Identifying where a recipient is in the buyer's journey allows you to align your emails to their particular stage, overcome any hesitation, and nudge recipients toward conversion. Let's take this example of a 32-year-old woman named Clare. What we know about Clare is that she's a career-oriented professional, has an interest in fashion, and is searching for new work outfits.

She has come across your clothing website and placed a few selections in the shopping cart, entering the data required to set up an account, but has left your site before completing her purchase. So, how do you use email to encourage Clare to not only come back and buy, but to re-engage with your brand?

And how does recognizing what stage she is in, within the buyer's journey, help you send her the right email? First of all, if you look at where Clare is in the buyer's journey, you'll see that she's a potential new customer in the interest stage, nearing the consideration stage. Since Clare has set up an online account, providing her email address, you could send her a welcome message thanking her for signing up and offering a discount on her first purchase.

You can then send her an abandonment recovery email to remind her of the items she left in the shopping cart and let her know how long they'll be held there. Cart Recovery campaigns, as they're known, work particularly well with an added incentive like free shipping. After this, the next step would be to help Clare move from the consideration stage to the conversion stage.

You want her to buy new outfits from your company, not the competition. At this juncture, email is recommending related products or accessories to complement the outfits that she selected, plus enticements of exclusive customer savings and ongoing benefits will work very well in getting Clare across the threshold from prospect to customer and in building goodwill and long-lasting brand loyalty.

WALKTHROUGH: UPLOADING AN AUDIENCE TO MAILCHIMP

So let's go ahead and add an audience list or subscriber list to Mailchimp. So we do this in the Mailchimp interface over in the Audience area. So we click into Audience, and then we have our existing audience with its 192 contacts and subscribers.

So let's add some more by managing that audience, and then looking at importing contacts. We're asked how do we want to do this. Upload a file, or copy and paste the data from my email subscriber list in. So let's go ahead and copy and paste. So what we need to do is we need to have all these data fields, email address, first name, and last name, or at least email address and maybe first name.

We may not need address and things like that. So we just paste that in, and these are just some test names here. We've got first name, last name, and email address. I will continue to organize. Now I can update existing contacts and subscribe them and continue to tagging. So tagging allows me to segment the audience. I can use popular tags, or I can use a custom tag, which I've created myself, in the interface.

So let's go ahead and add one of my custom tags. So maybe my new subscriber tag which I created, and then I'll continue to match. This gives me a preview of my first name, last name, email address. I finalize the import, and then they get a review of what it is I'm doing, the number of contacts and where it's going. I complete this, and then in my Audience dashboard, I can review what I've just done.

And, in here, I can see my 192 has updated to 328 subscribers. So that was just by managing the audience and importing contacts.

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LESSON 3: EMAIL DESIGN

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EMAIL COMPONENTS

There are certain components that contribute to writing and designing effective emails, and here we see the seven main components:

- Audience
- Sender name
- Subject line
- Copy/Email text
- Design
- Calls to action (CTA)
- Imagery

The sender name that displays in the email is very important. It is the first thing a recipient looks at to see if they recognize who is contacting them. Then they will decide whether to engage further.

- Sender name determines if they will read the subject line
- It can sometimes contain a name and the company name, for example, "Simon from the Digital Marketing Institute"
- Note that sender names should not be generic or just an email address, for example, info@yourcompany.com

SUBJECT LINE

It's important to craft your email subject line with both practicality and artistry. It will motivate and entice your recipients to open your email. The urgency and tone your subject line conveys will drive response to your offers and calls to action as well.

It should match the content of the body of the email and main subject of the message. In addition, your subject line should be engaging and relevant to your subscribers. As the saying goes, you never get a second chance to make a first impression, so it's essential to start off on a good note.

The subject line of an email is the first thing recipients see and can determine if they will open or not. If the subject line is not compelling, recipients will simply ignore your email. By adding a sense of urgency or deadline to your subject line, you can draw recipients in by prompting them to open and learn more.

Always ensure the body of the email aligns with the subject line. If it's unrelated, the user may no longer open emails or might, worse yet, unsubscribe. And in fact, this is a legal requirement of the CAN-SPAM Act in the US. Beyond the subject line, ensure that the content of your email is engaging and relevant to the recipient.

The subject line and first glimpse of message content work in tandem to encourage recipients to engage further and hopefully respond. There are various themes you can apply when creating a subject line for your email. You can go for curiosity. For example, by asking a question like, "Want to know how I get 10 million SEO visits per month to my website?"

You could plainly state an offer, such as, "Receive 10% off everything in our Summer Sale." You could demonstrate urgency as in, "Hurry, just two days left in our Huge Seasonal Close Out." Treat your

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subject line like a news headline, "Announcement, All of our stores will be open until 11 p.m. Monday through Friday."

Or focus on social proof, such as, "80% of people would recommend our company to a friend."

EMAIL COPY

Now that you've worked carefully on the subject line and know it will be opened, you need to focus on the content of the email itself. Here are some best practices for writing strong email copy:

- Create a sense of urgency.
- Keep your sentences simple and strong.
- Have a singular goal for each email you send. If you have two goals, send two emails.
- Make your email easy to scan.
- Use less 'we', and more 'you'.
- Align your email copy with the subject line.
- Know your target market and use language that resonates with them.

EMAIL DESIGN

Before you start designing your email, you need to consider why layout and visual appearance is so important. When you think about the emails you receive, many of them look and feel like a webpage.

Consider, for a second, the components that make up their design. They have images, clickable links, titles, and text content just like a landing page. In many ways, you can consider an email as a mini-web experience inserted into someone's inbox. Well-designed marketing emails enable personalized connections with customers, and contain customized relevant content appropriate to motivating engagement, action, and purchase.

Emails should be designed to be clear, concise, and motivating, and they will still be visually appealing and true to your brand's personality. This means you should design emails that include all the information a recipient needs to consider your offer, while also making it easy as possible for them to act on it, to know exactly what you want them to do next. Such as browsing, reaching out to a contact for more information, or completing a sale.

There are several reasons to invest time and energy into email design. It creates a better user experience, making it more enjoyable and compelling for the reader.

Good design should drive a consistent brand experience between your emails and your website, and make that transition seamless. Good design will help drive more conversions. And thinking from a design perspective helps you choose layout and imagery that supports your calls to action. Using brand colors, style, and imagery effectively will also increase brand recognition.

It's important to give some thought to layout when designing effective emails. Organize layout for skimming. People scan email rather than read word-for-word. Don't add too many elements or design becomes confusing. Instead, try to allow some white space in your layout.

Align your content into blocks, columns, and defined scalable modules. Create definition between content areas or blocks, being careful to balance headlines and sub-headlines so they support one another versus compete or confuse the reader.

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Keep calls to action and important information above the fold, in other words, visible toward the top of the message so recipients don't need to scroll to get to the point. You'll also want to aim for a width of 600 pixels to optimize design for mobile environments.

IMAGES

Now, let's look at the best practices for using images in your email campaigns. It helps to remember the following. Emails with images should not be considered a replica of a print mailer or brochure.

Not all ISPs will display images in email, so your email message copy needs to support and convey the ideas you want to illustrate. This can be accomplished through alt text, which is a snippet of text that sits behind an image, provides a description of it, and displays when images don't. Overuse of images may unnecessarily increase email message file size, resulting in deliverability or poor user experience issues.

What are the best ways to use images in an email? Well, use your brand assets and follow your brand style guide, if you have one. Definitely include product photos. Make sure your images are the correct size for your layout. Use pixel tracking images.

A pixel tracker is a one-by-one pixel-sized transparent image added to the code of an email, so when a user opens your message, the image is downloaded, letting the tracking software know that the email was actually viewed. Many ESPs will also add a tracking pixel automatically, so double-check with your email service provider as to whether or not you actually would need to do this manually.

Ensure your email message is not designed as one large image and that you have a balance of text and separate images. And then, always include the alt text and title behind each image.

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LESSON 4: CREATING AN EFFECTIVE EMAIL CAMPAIGN

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CREATING AN EMAIL CAMPAIGN

Now that we've presented an approach to overall strategy and the components of an effective email message, let's focus on the email campaign itself. Starting from scratch can seem a little daunting, but by following a few basic steps, you'll be well on your way to hitting the send button and getting the results you want from this channel.

First, identify the need for an email campaign and understand where it fits within the five levels of strategic messaging. Always ask why am I sending this message and what do I want recipients to do when they receive my message? Next, define campaign requirements. You should have a stated goal, understand the tone you'll use, and know which segment of your audience that you're sending to.

Perhaps a slightly different version of your message would be appropriate for another segment. That might require multiple message versions or a totally separate campaign. After that, you'll be writing both the subject line and body copy for your email message. You'll design and select images for your message, and then set up tracking and reporting.

Think about testing something in the email message to optimize response. Send your campaign, and finally, analyze the results.

WALKTHROUGH: CREATING A CAMPAIGN IN MAILCHIMP

So, let's go ahead and create a campaign in Mailchimp, and we can do this by pressing the Create button, the top corner, or indeed the Create Campaign button in the other corner. So, when it loads up, we have number of options. What do we want to create?

So, we're going to go ahead and create an Email campaign. For us, is it going to be Regular, Automated or Plain-text? We're going to go ahead and create a regular campaign. We'll just name it something we'll recognize, and when we're happy with our naming, we can go ahead and press Begin. Now, when it loads up, there's a number of fields we need to fill in.

First of all, who are we sending our email to? It's going to be our Straya Day recipients, our 384 subscribers there. So, when we know who we're going to send a campaign to, we have to say, "Well, who is it coming from?" So in this case, it's going to come from me, and I just put in my name, my sender name and my email address, and I go ahead and Save. I now have to decide what's my subject line going to be?

Two fields to fill out here. The first one is our subject line, and the next is our preview text. So, we need to fill both of those out and Save. Now, we need to go ahead and design our email, so in the Design area, we just press open the Design Email CTA, and when it loads up, we're able to choose our templates.

We have a number of featured templates at the top, and then some basic templates which we can choose from. So, just some simple layouts. I'm going to go ahead with a one-column basic layout, and then when it loads up, the first thing I'll look at will be my logo. So, I can edit my logo, and then over in the right-hand pane, I can see the different options.

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I can replace it, or edit it or whatever. So, I can replace my logo with images that are uploaded from my Mailchimp assets area. And I can go ahead and press Save. I now need to start looking at designing the remainder of my email. So, I click in on the main body copy of my email, and I can just edit the text there. So, I'll just paste in something that I've written already, and I just paste that in there, and when I'm happy enough that it looks okay, I press Save & Close.

Now, we'll just add some other elements to the campaign, so we might add in something like an Image Group. So, we can just drag that from the right-hand pane into the area of the email that we want to put it in. And then, we can just add in our images. So, what we'll do is we'll upload an image, and in here, in my asset bank, I can choose an image that I've previously uploaded, and then I can go ahead and insert this.

Likewise, with my second image in my gallery, I can upload an image. Now, bear in mind, I have a number of images uploaded here. If I want to upload an image, I just press the upload CTA, and then they rest in my asset bank, and I can click it, and then insert it into my email. So, that's kind of like what my images look like right now, and I can Save & Close.

So, we'll add some other elements. Maybe I'll add in something like a button, and I can just pull that in and update the CTA button from 'Buy Now' to 'Enroll Today' maybe. I can enter in the color that I want. So, in the Style area, I can update my colors and decide what exactly it's going to look like, choose your brand colors, and Save & Close.

Then, in the content, I can upload my URL, and everything looks as I hope it to look. So, that's our kind of overview of our email. We've got these different elements, and we can drag in things like a divider, which will just break up the different elements of our email.

And when we're happy, we can Save & Close. And there's multiple options for us to design and pull in. It's all drag and drop, all very easy to do. And when we're happy, we can go ahead and continue. So, to review, we've done our to, our from, our subject, and designed our email.

So, what we'll do now is send a test email to see what it looks like in the inbox. So, I'll send that test email to myself, and then when that's sent, I'll go into my own email, and what I'll do is just see what it looks like in an inbox, in a real inbox. So, very quickly, we've created a fairly professional looking email using Mailchimp and sent that to our own email to see does it work as a standard email, and does it look nice as per our design in Mailchimp itself.

DELIVERABILITY FACTORS

Email Deliverability is the measure of how many emails actually make it to a recipient's inbox. Keep in mind, however, that the term 'delivered' does not specify which inbox it was delivered to. Here are the different inbox folders that your emails could end up in:

- Primary Inbox
- Social
- Promotions
- Junk
- Spam

If your subject line makes your email look like spam then the recipient will probably think it is spam, and the protective spam filters used by the ISPs will probably recognize it as spam. Here are tips to manage this:

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- Avoid ALL CAPITALS.
- Avoid excessive and unnecessary use of punctuation (!!!).
- Only use symbols and SP$C!AL CH@RCT3RZ sparingly, and only when relevant.

If you send an email with too many images, it can affect the deliverability of the email. For example, emails are quite likely to end up in a spam folder if they are comprised of several images with very little text in the email itself. The ratio of image to text does carry some weight with spam filters and it's worth spending time on getting the right balance.

The use of URL shorteners (such as Bitly) is a notorious technique used by spammers to hide the nature of URLs they link to. They rank high on spam filters, even if the links themselves are legitimate.

- Avoid using URL shorteners.
- Avoid inserting the full URL link as text.
- Instead, create a hyperlink with the appropriate text.
- Ensure all your links go to legitimate domains and are valid.

CAMPAIGN DELIVERY CHALLENGES

Once your email makes it through the servers and past the ISP filters, it will be delivered. But there are some challenges that still face it. These include:

- Bounces
- Complaints
- Spam Traps
- Sending Volumes
- Engagement

There are two types of bounce: hard and soft.

- A hard bounce is a permanent failure where retries will not be successful.
- A soft bounce is when the email server cannot deliver your message, but it is still trying and will continue to try for a limited period of time. This often occurs when the email was successfully delivered and later bounced back after checking to see if the email actually exists. You can try to rectify soft bounces by sending the email again when the mailbox may have some space; waiting for some time to pass until the server is likely up and running again; and finally, reducing the size of your message.

A spam complaint is when the email recipient clicks the Spam or Junk button on your email in their email client. Most ESPs provide the Spam or Junk button and it only appears when the email is in the inbox.

Fun Fact: While most people are aware that unwanted or Bulk Email is called Spam Email, did you know that normal, legitimate email communication is actually called Ham Email? The name could be a nod to Ham radio which is a radio frequency for all sorts of non-commercial communications. Please be aware, it might not be a good idea to refer to your email marketing or client campaigns as Ham as it may create some confusion, but it is interesting to know!

Spam Traps are real email addresses that don't bounce and are monitored by ISPs and blacklists. Often, ISPs will take over abandoned email addresses and turn those into spam traps. There are three different types:

- Typo – an email address with an ISP domain misspelled (ex: Comnast.net, Homtail.com)
- Recycled – an email address that existed, was abandoned, and later reactivated by the ESP
- Pristine – an email address that never opted into any email communication

Spam trap addresses cannot opt in to receive email. The only way a spam trap address can end up on your list is if you're not maintaining healthy lists or if you're not abiding by the rules of permission-based email marketing.

A further challenge is 'sending volume'. ISPs want to see an established sending history and sending pattern in order to help determine inbox placement. Spikes in email volumes will often trigger spam filters due to inconsistency with an existing pattern.

Let's say you send a regular weekly newsletter to about 10,000 recipients. Suddenly, you begin emailing more than 70,000 people per week. This could trigger an ISP's spam filter because it doesn't align with your sending history. You must keep a regular sending pattern that doesn't have large fluctuations with volume.

Then, there's engagement. Certain ISPs looks at engagement of the recipient to determine inbox versus junk folder delivery. These types of engagement include open, click, save, reply, forward, move, etc. The more engaged a recipient is, the greater the chance of the email landing in the inbox. ESPs look at the sender's IP and domain reputation, along with user engagement, to score the sender.

CAMPAIGN DELIVERY MANAGEMENT

There are multiple areas to test and optimize for response and email marketing, including creative elements, such as the subject line and message design, as well as other elements like offers or send time of day. If more recipients are likely to engage with your email at certain day parts, such as morning versus evening, you should send at that time to increase opens and clicks.

And again, increasing opens and clicks feeds back into better deliverability for ESPs to monitor. When it comes to your sending identity, use a real email address tied to an account which you can receive replies in, instead of a no-reply address. You'll want to be able to address any responses or complaints. Another check you should do is to review the performance and results of previous campaigns.

This will help identify both any deliverability issues as well as highlight winning and losing efforts to test against. After you deploy your campaign, begin reviewing reports 24 hours later to measure opens, clicks, bounces, and more. If your ESP provides bounce details on each undeliverable address, review them to learn any problematic trends and see which records should be permanently suppressed or deleted from your list.

After your campaign has been deployed and results are available, it's time to read, measure, and understand your key performance metrics. Good metrics include opens, clicks, conversions, and web-site trends, such as pages viewed and time on site. These are actions you want people to take.

Bad metrics are contact churns, such as unsubscribes, opt-outs, bounces, complaints, and spam. If you notice, for example, that one of your campaigns has nearly a zero clickthrough rate or a high bounce rate, these are immediate red flags to investigate. You should definitely pause and research

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those problems before continuing to deploy campaigns in order to understand any issues causing them and be sure that they're resolved.

Bounce management is essential and normally reported by your ESP. Bounce management is part of good email hygiene. Other important list hygiene practices are to purge your email list regularly of invalid, undeliverable addresses, often known as hard bounces, to monitor soft bounces in an attempt to redeliver to them.

If delivery continues to fail, then consider suppressing them. Monitor non-openers and attempt to reactive them. If you can't, consider suppressing them from future campaigns unless they engage in other channels. Remember, use double opt-in to ensure that a user's email address is not only valid, but that they, in fact, want to receive your messages.

Monitor your email deliverability. Track deliverability by paying close attention to bounce rates as well as response rates, and by using ESP feedback loops to monitor complaints.

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LESSON 5: TESTING AND OPTIMIZING AN EMAIL

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EMAIL TESTING

It is vital to quality control and preview your email campaigns before deployment to resolve any potential issues with delivery and rendering. In addition, you can and should test different aspects of campaigns for response optimization.

For example, testing subject lines, content, images, time of day, offers, and segmentation will help you better understand your audience motivations and optimize performance. When testing for performance optimization, be sure to follow these basics. Test only one or two elements simultaneously to reduce complexity and make sure your test groups are large enough to yield statistically significant results.

Divide your list or the portion of your list that you'll be using for testing into equal size segments. Then, randomly populate those segments with subscribers to prevent any built-in bias. Next, make sure the elements you're testing, whether offers or subject lines, are distinctly different from one another.

That way, you'll have sufficient variety and contrast among your test treatments. There are a number of preview and quality control tools available for advanced users. These offer all sorts of features. Some of the more popular ones are provided by these two companies, Litmus and Email on Acid.

A/B TESTING

In the world of response optimization testing, A/B testing is when you run two test treatments or approaches against one another. Basically, it's a head-to-head test. The good news is that it's usually very easy to conduct an A/B split test from within most email service providers and marketing automation platforms.

In an A/B test, two variations of a specific element in your email campaign are created with the purpose to see which performs best. A/B testing can be used to test almost any element of an email, but only accomplishes one test at a time, and you'll want to keep things simple that way in order to get accurate results.

It's important to know and follow best practices for A/B testing. Here are some sure-fire ways to get the best bang for your effort. Test early in your campaign deployment to a small segment of your total list. If you have a clear winner of your test, such as the subject line, you can then deploy it to the remainder of your list.

Only test one element at a time. Create only two variations of the element you're testing, obviously, the A version and the B version. Trust the results you get and the hard data rather than your gut. Personal bias can interfere.

A/B testing is the simplest and most common testing method in email. Because it's easy and fast to implement, it's highly effective at identifying exactly what drives opens and clicks. For example, with A/B testing, you can determine the best subject line for a given campaign.

You can understand which of two target audience segments engages with you more often. You can figure out the best welcome campaign offer to motivate a first purchase. You can conduct A/B testing on elements of your email message or aspects of the campaign to discover which of the following yield optimal results for you.

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For example, you can test elements like your from name, subject line, a call to action, copy or text and headings within your email message design, HTML versus plain text email, personalization, and many more.

WALKTHROUGH: A/B TESTING WITH MAILCHIMP

Now to do some A/B testing with our email campaigns, we just need the paid-for version of Mailchimp, and we can go ahead and create a campaign. We're going to choose an email campaign. And when it loads up, we can see that there's four options here with the paid version.

One of them is now this A/B Test option. So we click into A/B Test and we go ahead and create a campaign name that we'll recognize. And when this loads up, we are asked, well, what portion of our audience are we going to test it on, our entire audience or a segment? We choose the appropriate one and move on to Next. So now, what exactly are we going to test? Is it going to be subject line, from name, content, or send time?

And indeed, what percentage of our audience will be receiving our test? So we can set this slider, and then over on the right-hand side as we move it, we can see the size of our audience test increasing or decreasing with the size of the slider. So we're going to choose a subject line, and we're going to choose two subject lines.

And we'll set our percentage to something like 50%, and we'll go ahead and we'll press Next. So we've set the conditions for our test campaign. We just need to enter in our subject lines and our preview text, and then go ahead and design our email as we would have done before using the Mailchimp email design option.

CAMPAIGN PERFORMANCE

There are numerous process metrics used that reveal the effectiveness of email campaigns. By understanding how those metrics are calculated, you'll have a better comprehension of their importance and the story they tell.

Let's take a look at some of the most basic email marketing process metrics. Delivered emails. The number of delivered emails is the total number of emails sent minus the number that bounced, that is, that couldn't be delivered. Email delivery rate is the percentage of email messages that were sent and reached at least one of the recipients' email boxes, their inbox, social, promotions, or even the spam folder.

Delivery rate is calculated by dividing total emails delivered by total emails sent. Open rate. This is the percentage of people who received your email and then opened it. Open rate is calculated by dividing the total number of emails that were opened by the number of emails that were delivered. Clickthrough rate.

Clickthrough rate, or CTR for short, is a percentage of recipients who clicked on one or more links within your email. Clickthrough rate is calculated by dividing the total number of link clicks by the total number of emails successfully delivered. Click-to-open rate is a variation on clickthrough rate in which the total number of clicks is divided by the total number of emails opened rather than delivered.

Conversion rate. This is the percentage of people who received your email and went on to complete your call-to-action, whether buying, filling out a form, or replying. Conversion rate is calculated by

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dividing the total number of emails delivered by the total number of completed calls to action from the email campaign. Common conversions associated with email campaigns include registration or filling in a lead form, making a phone call or phone inquiry, booking a demo or appointment, an online purchase from an e-commerce website.

The bounce rate. Bounce rate is the percentage of emails sent that bounced, meaning they could not be delivered. To calculate that, we take the total number of bounced emails divided by the total number of emails sent and multiply it by 100 to get the percentage. The unsubscribe rate is the percentage of people who opted out of email.

They don't want to receive future communications from you. Unsubscribe rate is calculated by dividing the total number of email unsubscribes by the total number of people who received the message. In addition to those basic process metrics, which are calculated for almost every email campaign you send, you will also want to measure these important overall program metrics.

First, the share or forward rate, which is a percentage of people who clicked on a Share This button to post to social media or forwarded your email. It's a similar calculation to clickthrough rate, but you only use the number of clicks on the Share or Forward button. Considering the number of clicks, divide that by the number of delivered emails, calculate by 100 and you have your share rate.

List growth. The overall growth of your subscriber list over a specified period of time that you choose is measured here. While it's a relatively simple metric, it's important to measure list growth because people are always joining as well as leaving your email list and you want to be sure your growth is net positive.

Obviously the more subscribers you have, the larger your audience to market to, and the greater the potential for more revenue and customers from this channel. To calculate list growth, just count the number of new subscribers you receive per week, month, or year. And finally, revenue per email. Knowing how much revenue on average an email subscriber generates over the course of a campaign or a period of time, like a month, quarter, or year, is vital to understanding the value of your list.

To calculate revenue per email sent, simply divide all revenue generated by an email campaign by the number of customers who purchased from that campaign. To calculate revenue per subscriber over, say, an entire year, divide the total revenue generated by your email marketing efforts by the number of subscribers on your list.

While this metric may be more difficult to calculate if email campaigns do not directly generate sales, if you can calculate it, definitely do. It's also imperative to recognize the importance of monitoring non-email engagements such as website logins, ad traffic, store purchases following a campaign, because email can drive people to take action in other ways rather than just on your website.

If we take a look, specifically, at Mailchimp as an example of an ESP providing reporting and functionality, the report functions allow digital marketers to analyze campaign performance, specifically by providing information about recipients, messages delivered, open rate, clickthrough rate, overall, and by unique link, and even industry opens and clicks as benchmarks.

OPTIMIZING EMAIL CAMPAIGN PERFORMANCE

Optimizing is the process of continually improving certain elements of your email campaigns. Here are some ways you can optimize your campaign performance and email click-through rates:

- Simple explicit CTAs.
- multiple links for the same action.
- offering deals for a limited time.
- testing different colors.

Mobile devices are used by both consumers and professionals and should form a fundamental part of your email marketing so we need to be mindful of how people will engage with our email campaigns on a mobile device

Identify the ways to optimize email for mobile:

- Keep the flow of mobile all the way to the landing page.
- Make images and emails lightweight for mobile devices.
- Code for phone, tablet, and desktop.
- Use reports to identify mobile device opens.

MINIMIZING BOUNCES AND UNSUBSCRIBES

In order to minimize the number of undesirable reactions to your email campaigns, like bounces and unsubscribes, it's important to create relevant content that aligns with subscriber expectations.

Always ask yourself, are you sending content that is in sync with what your recipient signed up for? Does your subject line match the content in your email? Does your email cadence and frequency resonate with what your recipients signed up for and are expecting?

It's essential to monitor your email campaign reports for multiple reasons. Certainly, to review process metrics, like opens and clicks, and spot any dips or spikes. To determine unsubscribes and reasons for complaints. To understand what drives or inhibits campaign conversions and sales.

And of course, to monitor for deliverability issues, including bounce problems or list hygiene. Make sure you're sending emails to the right recipients. Identity people who are disengaged and reduce or stop communicating with them.

One more element to look at is an email preference center. This is a more advanced subscription and unsubscribe page. When a user clicks unsubscribe, instead of instantly removing them from your list, you could provide them with a way to control, select, or change the types of emails they receive and how often they get them. This enables them to choose just the messages they want to continue receiving, choose the ones they want to stop receiving, or adjust the frequency of all emails.

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WALKTHROUGH: MEASURING SUCCESS WITH MAILCHIMP

There are a number of ways to report on our mail activity. So we can, first of all, look at the audience area to figure out who exactly is in our audience, recent growth. We can look at our tags.

We can look at our predicted demographics, engagement levels by audience, locations, all kinds of insights into our audiences itself. So audience is the first place to report on. The next place is our campaigns. So in the Campaigns area, we can pick a campaign and just view the report for that campaign.

And when it loads up, we're able to see things like our benchmarks. We can look at the number of opens, clicks, bounced, and unsubscribed. We can look at our predicted demographics when that loads up, our performance over a 24-hour period after the send, different link clicks, the top locations where people click through from. So all of this gives us an insight into the effectiveness of our campaign, and where we can learn and do better in future campaigns going forward.

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LESSON 6: MARKETING AUTOMATION OVERVIEW

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MARKETING AUTOMATION

Marketing automation is an efficient technology-driven way to trigger the sending of common recurring email campaigns without someone having to manually and repeatedly deploy the same message every time it's needed. Automated email is particularly useful for B2B organizations with long sales cycles and complex, high cost, big-ticket products and services, where there may be multiple stakeholder involvement and where customers need a lot of information to make a decision before purchasing.

This information can be drip-fed to prospects over the length of a sales cycle automatically through email. Sending automated emails keeps potential customers engaged and allows sales teams to focus on closing deals rather than spending a lot of time engaging with leads who might not be ready or qualified to purchase.

Marketing automation greatly improves email channel effectiveness by relying on software to handle deployments rather than having an employee manually have to do so each time a person buys or signs up through lead forms and so on. Through automation, various marketing actions, including email deployments, social media posts, text messages, and more can be set up to trigger based on different use cases and defined business rules relevant to your organization.

So, let's look a little closer at marketing automation. When it comes to email marketing automation, sometimes known as triggered email is simply the sending of emails to recipients automatically using software. Once someone completes an action on your website, for example, such as subscribing or submitting a form, or even buying, your automation software can deploy an email that confirms their action and instructs them or advises them on what to do or what will happen next.

An example from the B2C world might go something like this. Someone buys on your website, your e-commerce store, so your marketing automation software automatically deploys a purchase confirmation email. Or someone registers online for a webinar, they receive a registration confirmation, then timed reminders about the upcoming event, perhaps both a day and one hour before the webinar starts.

All of these emails are sent automatically based on rules that you, as a user, establish in the software. An example from the B2B world could be a decision-maker in an organization you are targeting sees a LinkedIn ad for a new e-book your company just published. The prospect clicks the ad, reaches your e-book landing page, and decides to get the e-book, but access to it is gated by a form.

The prospect enters his or her name, corporate email address and phone number, and submits the form. Almost immediately, an automated email is sent to the prospect, providing a link to download the e-book. Seven days later, your automation software sends the prospect a follow-up message, encouraging them to explore other content assets or e-books that you might have.

Your marketing automation software can continue to drip invitations to video, blog, or social media content to this prospect over the next few weeks or even months in order to build on their initial interest and engagement and slowly but steadily nurture them from prospect to paying customer.

Imagine then, several more weeks pass, and an automated email is sent to the prospect with a special offer for a free trial of your product or service. The prospect signs up for the free trial, and midway through the period, another automated email invites them to speak with a sales rep. By this

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time, your series of automated emails has enabled product education, information, and free trial, pre-paving the way to a productive closing sales conversation.

By the time the lead has spoken to sales, they have engaged with multiple pieces of your content, understand your offerings, and are favorably predisposed to your company. As a result, they are far more likely to buy than those who haven't been through this warm-up process. Here are examples of the types of emails you can automate.

One, customer lifecycle stage campaigns, that is new customer welcome emails or lapsed customer reactivation. Two, transactional or functional emails like shipping confirmation and order receipts. Three, behavioral campaigns, those triggered by subscriber behavior, such as an abandoned cart reminder or a post-purchase upsell or cross-sell offer.

Four, reminders or alerts such as notifications to customers on an upcoming event, or that a favorite item is back in stock. And five, date-driven campaigns like birthday, anniversary, expiration, and renewal campaigns.

So, what is a workflow in marketing automation? In marketing automation, a workflow is a series of rules that you set up to send automated email campaigns. Here is an example of a simple workflow. You set a rule that instructs your software to send a confirmation email when a website visitor submits a contact form saying, "Thanks for getting in touch. Our team will reach out to you shortly."

Such automated responses help manage expectations. An example of a more complex automation workflow would be a branching series of multiple email messages deployed in sequence. When, for example, someone signs up for a webinar, the first message sent to all registrants would be a copy of their webinar signup requesting that they confirm attendance.

If someone opens that first email and confirms attendance, branching logic can then direct deployment of a message containing content helpful to review before the webinar for that segment. A separate branch to non-openers would direct the deployment of a different second email, reminding those people to still confirm their attendance.

These examples are just a few illustrations of how automated email can be used to create a sequence of messages that facilitates an ongoing conversation with prospects or customers based on their specific interactions with your brand.

The powerful benefits of marketing automation are many and include time savings by keeping subscribers in the loop without needing to have a person sending individual or batch emails to each contact. Improved marketing results, thanks to constant nurturing and the ability to tailor relevant content in different branching sequences to unique segments.

Greater time efficiency and focus for marketing staff, freeing them up for more labor-intensive tasks or projects, which can't be automated. Data synchronization helps sales teams manage their time and better align with marketing. Email recipients and website visitors get a better user experience because of personalized content.

Most email service providers and marketing automation software providers will offer the basic functions of marketing automation, but the more sophisticated platforms allow you to complete sequences and journeys, as well as establish branching logic in your deployment rules. In many cases, the ROI of this kind of software can take at least six months to a year to prove.

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This is a long-term investment and commitment, and you may need to get more buy-in than just from the marketing team in order for your company to commit. In today's world, if your current platform does not offer marketing automation, it is definitely time to consider an upgrade.

MARKETING AUTOMATION PROCESS

There are three key building blocks for automated email workflows for B2B and B2C companies.

- Action – What did your contact do?
- Decision – Where do they go?
- Timing – When should the response function happen?

Let's take a closer look at each of these.

Action: What was the trigger that caused the contact to act?

- Was it a form submission?
- Was it a page visit?
- Or a reply to an email?
- Was it a link click?

Decision: What happens after the action, where does the contact go?

- Conditions - if/else
- Tags and Footprints - Tags can be used as part of lead scoring and help you identify highly engaged users
- Stop/start sequence

Timing: when should the response happen?

- What day of the week?
- How much of a delay should there be?
- What should happen before and after the send date? There might be a time-sensitive issue, such as a public holiday to consider.

The marketing automation process consists of the following steps:

- Web Form Submission – The action that triggers the automation flow.
- Send Email – Send the specified email to all users who enter this step
- Information Tagging – Assigning a tag to the user helps identify them and it can be used in segmentation.
- Delay after form submission – A period of time the user waits before proceeding to the next step.

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WALKTHROUGH: CREATING AUTOMATED CAMPAIGNS WITH MAILCHIMP

One of the things we can do with Mailchimp is to send automated emails. Now, just to ensure that everything is synced up and talking to each other, we can look at our Integration section in the Account area. And then, press Account.

And when this loads up, we can see across the top, we have a number of different options. Let's click in on Integrations. In Integrations, we can hook up our social media activity, our Google Analytics, our website eCommerce providers are all listed in there, our website builder is there, custom stuff, and we have a load of different areas that we are able to integrate with Mailchimp, just so our email subscribers are talking to our website or our social channels.

Now, back in the interface, we can shortcut to Integrations by pressing the Integrations icon, and that will bring us directly to that area where we're able to ensure that all of our integrations and all of our applications are talking to each other as expected. So, let's go ahead and create an automated campaign.

So, we're going to choose an email campaign, and then across the top, we're going to choose an automated email campaign. We have a number of featured automations that we can set up fairly handy there. So, we can set them up by tags, subscriber activity, eCommerce, date-based, different kinds of automation options that we can choose based on what we're trying to achieve.

So, let's start by welcoming new subscribers. So, we call it something we'll recognize in our campaign list, and we have different options up the top as well that we can choose from. Begin and we'll create our automated email campaign, so it's very straightforward, very similar to before. When the sends happen, who's it from, the subject line, we can edit this, of course, and indeed edit the content of our email.

So, what we're most interested in to begin is the delay and the recipients. So, what we might do is say, "Send our email one hour after someone subscribes," and that is when our welcome email is sent. So, when we're happy enough that our sending looks okay, that our design is okay, we can start sending and start that automated integration in Mailchimp.

And this will allow us to send automated updates to people based on different conditions, taking a lot of work out of sending emails to people just to keep them informed, just to keep them in the loop, and keeping them engaged with our brand easily using automated email sends.

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LESSON 7: HOW TO BE A BETTER COMMUNICATOR

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WHY GOOD COMMUNICATION MATTERS

Have you ever realized that we operate on communication autopilot each and every day? Think about it! You cannot not communicate. Even when you're silent, everything you do with your body sends a message. When you think you are doing nothing, you are still sending signals.

So obviously, we communicate with other people every day. However, to become a really good communicator, like with any skill, you have to practice it. Being seen, being heard, and being understood are not givens. You have to work hard to ensure that you are sending the correct message, and that it is understood.

Communication serves five major functions. We use it to express feelings. We use it to inform and to influence. Sometimes we communicate simply to meet social expectations. In other words, people expect us to talk! And we sometimes communicate in order to imagine, whether for ourselves or to inspire greater creativity in others. And to do any of these things effectively, it follows that we need to communicate effectively.

Effective communication is particularly important in the workplace. It can bring real benefits, such as reducing unnecessary competition within departments. It also helps employees work together more harmoniously. This in turn results in more productive teams. And that leads to an enhanced service for customers.

In the workplace, you are often judged on how effectively you communicate with others and how you project yourself to the people around you. This involves a lot more than simply being careful with the words you speak.

As well as watching your words, you need to pay attention to your nonverbal cues and gestures. These can make or break relationships and may have a significant impact on your success. So, to enhance your effectiveness as a communicator, ensure you pay particular attention to a number of key nonverbal cues.

First of all, check your posture. A poor or slouching posture exudes indifference or carelessness. It tells the other person that you're really not very interested in what they're saying. And if you speak with a poor posture, you can undermine what you're trying to say. At worst, your posture will distract the listener. To be perceived as confident, you must stand tall. It gives the outward appearance of credibility, strength, and vitality.

Second, try to be in sync with the person you're communicating with. This doesn't mean that you have to imitate them! However, remember that, when we like someone, we naturally match and mirror their voice, tone, tempo, body posture, and movements. This helps to establish a good rapport with the other person. And if you don't 'move in sync' with your teammates, it can make you look like you're not interested in them, are not a team player, or, in extreme cases, that you are lying. You are marking yourself out as being different from them.

Third, use your face and body to maximum effect. Have you ever communicated with someone who stood rigid with a poker face while they were talking? Even if they are telling you how enthusiastic they are about their project, their body gives off the message that they don't really care, even if this isn't the case. So when someone is talking to you, be sure to give them physical as well as verbal feedback. If you don't give feedback physically, people think you don't care, that you're stuck up, or a host of other negative attributes.

The fourth cue is related to that. Have you ever had a situation where a person's words say one thing, but their body says something else entirely? Perhaps they're trying to tell you how calm and in control they are, while they fidget and twitch and nervously glance around them. You get confused by the mixed messages.

So make sure you match your verbal and nonverbal messages. Don't say, "Yeah, that sounds great" in a monotone voice, while you cross your arms and roll your eyes. Speak enthusiastically and lean forward to show how engaged you are with the idea.

The final cue is your smile. Now, you don't have to walk around all day with a great, big grin on your face. But, at the same time, don't under-estimate the power of a smile! Smiling demonstrates confidence, openness, warmth, and energy. It also sets off the mirror neurons in your listener, instructing them to smile back.

However, don't be accused of being a 'perm-a-grinner'. If you smile too often, you might be perceived as insincere and misleading. Find a suitable balance.

Even if you do manage to control your nonverbal cues, there will be situations when communication is difficult. For example, when you're communicating with a client or your boss, or when making an important speech or presentation, it's natural to sometimes feel uncomfortable, awkward, or nervous.

The most common negative physical reactions are 'butterflies' in your stomach, trembling or shaking, and a warbling voice. Although they can feel unpleasant, these are actually natural physical reactions to stressful situations. But bear in mind that they are merely short-term physical feelings. They are only temporary and last from a number of seconds to no more than a few minutes – maximum.

Don't view them as negative. This is not your body going into lock-down because you are anxious or nervous. Instead, your body is simply gearing up to work at peak performance. So although you may be pumped full of adrenalin, have the shakes, and feel sick in your stomach, view all of these as signs that your body is ready to give you the very best performance it possibly can for you to deliver a knock-out presentation, win over that client, or whatever.

So get out there and practice your communication skills. Smile at and talk to strangers. Practice making a presentation. Lead a team in a project. Coach or mentor a colleague. All these activities, with practice, can enhance your skills and make you a better communicator!

DIFFERENT TYPES OF COMMUNICATION

Perhaps the most obvious way that you communicate is by speaking. However, you also communicate by the signals you send and receive each day through a multitude of nuances, gestures, and expressions. While these actions are voluntary, they are not always conscious. Indeed, we occasionally send and receive communication signals without even being aware that we are doing so. This can lead to disconnects or misleading messages.

However, this problem is also an opportunity because addressing these signals is the key to effective communication. In other words, if we can train ourselves to be aware of the signals we are constantly sending, then we can align our messages to what it is that we really want to say. And then our communication is no longer accidental and vague, but purposeful.

There are five types of communication to consider in the modern workplace: listening, visual communication, verbal communication, non-verbal communication, and written communication.

Understanding these different communication styles and paying attention to which styles our teammates and our boss gravitate toward can improve our interpersonal skills, build trust, and help us get more done with less frustration.

Let's consider listening first. When we think of communication, we often forget that all communication begins with listening! We listen to what is being said and what is not being said. Listening effectively involves active listening. This is a vital component of the communication model because if we cannot listen to the colleague or client sitting across from us, we cannot actively and effectively engage with them. Learn to listen as the basis of all good communication.

The second type is visual communication. This conveys ideas and information in forms that can be seen. As you can imagine, this includes a broad spectrum of methods. Common methods include signs, drawings, graphic design, advertising, animations, and electronic resources. Have you ever considered why visual communication is so very effective? It's because the human mind processes information in images. So it's worth remembering that most people respond more quickly to visual images than to text.

The next type of communication is verbal communication. This is probably what most people think of when they think about communication. Verbal communication occurs face to face, over the telephone, or in a social media context via Skype or Zoom, and so on. Remember, however, that it is not just about the words used. It is also about the complexity of those words and how we thread them together to create an all-encompassing message. Pay particular attention to the intonation – including the pitch, tone, and cadence – used while speaking.

Here are some tips for effective verbal communication. First, silence is good if it's a natural contemplative pause in communication. Comfortable silences can enhance a conversation or diffuse tension. Also, use confident language, speak slowly and clearly, and aim to avoid filler words such as 'um', 'uh.' Ask questions to clarify and show interest. And seek common ground, even in conflict. Try to identify a shared interest with your conversation partner. Be sure to be prepared by doing research and knowing your subject. Think of the worst question you can be asked and know the answer.

Also, when necessary, use a verbal bridge to change subject. For example, bring up another topic to subtly shift the focus. You might say, "The important thing to remember is..." Be self-aware during an important or stressful conversation, by relaxing and acting normally – though remaining professional. And remember that, while words are important, when speaking face-to-face they cannot be separated from non-verbal communication.

And this brings us nicely to the fourth type of communication: non-verbal communication. The physical message that we project through our body while we speak often says more than the actual words we use! Non-verbal communication includes facial expressions, body gestures, posture, eye contact, hand movements, and touch.

For example, if you're engaged in a conversation with a decision maker about your cost-saving idea, pay attention to both their words and their non-verbal communication. They might say that they agree with your idea. However, their non-verbal cues – such as avoiding eye contact, rapid blinking, or feet direction – may indicate the exact opposite! So, when it comes to body language, pay attention, observe, and trust your intuition.

The fifth type of communication is written communication. Pay attention to this because poor writing skills often lead to confusion and embarrassment or even potential legal involvement. A golden rule in

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written communications in our digital age is to remember that your message will always be there and will be stored forever. So take care with your words!

In all written workplace communications, remember that poorly written messages and a sloppy or lazy style reflect badly on you and your organization. Ask yourself, “Is this message one that I am comfortable being connected with forever?”

STRATEGIES FOR EFFECTIVE COMMUNICATION

Every day, you interact with your colleagues and clients. But how could you make these interactions more effective? Consider using these tried-and-tested strategies to improve your own communication skills.

First, pause for effect. Pausing is especially useful if a conflict situation arises from what you have said. A pause allows things to cool. And the silence means you don’t say anything that may inflame the situation.

Long pauses happen in tense negotiations when the first person to speak is usually judged as being the ‘loser.’

The second strategy is to use silence to regain control. If you are speaking at a meeting and people are becoming distracted from listening to you and your message, try this very subtle trick. When you are speaking, look directly at the person who is now on their mobile phone or in conversation with another person. And then suddenly stop speaking. The person otherwise engaged is now aware that a change has occurred, and where there was noise, now there is silence. So they turn their head to face the silence. You can then meet their face with a smile or a verbal request to put their phone away and tune back into the meeting.

However, don’t do this too often, as there is a risk that you could appear passive-aggressive!

The third strategy is to learn to listen. By truly listening to another person and viewing them with interest and curiosity, you will substantially increase the impact of your shared communication rapport.

Active listening is a four-step process. First, truly listen to the person and be seen to physically listen. Cues include eye contact, face and torso in alignment, nodding your head and the occasional non-verbal ‘uh-huh’.

Second, feed-back the content and feeling and your understanding of the person’s words. And then confirm you heard the person correctly. And finally, ask a relevant follow-up question to further clarify your understanding of their situation.

The fourth strategy is to observe body language. Do we observe enough of the signals we are being sent by other people? Probably not! When communicating with others, it is helpful to observe the other person – really observe the other person. Break down their bodies into specific areas requiring your constant focus.

Study their eyes. If they are glancing upwards, it means they are thinking. Are they smiling? Is it spontaneous or forced? Real or not? And gaze at the face. Can they maintain a ‘face’ gaze without nervously turning away?

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Also watch for hand signals. For example, hidden hands, such as in pockets, is regarded as deceitful. If they are touching their mouth, it can indicate uncertainty. What about their blinking rate? It increases if stressed. And touching the mouth while blinking is regarded as a strong indication of telling lies.

Check their proximity. Are they too close or not close enough? Are their arms folded? Folded arms with a smile signals a confident and relaxed attitude. But without a smile, folded arms can seem hostile.

Observe the head movement. A slow nod shows interest, but a fast nod displays disinterest. And also observe the feet. It a person is talking to you while their feet are pointing away, it indicates a desire to leave.

Let's consider the fifth strategy now. This is to ask questions. If you are having a difficult conversation, or are in a conflict situation, asking a short yet impactful question can be particularly effective.

For example, if someone mentions AI, you could ask, "When you say 'AI' in this context, what exactly do you mean?" Using the word 'context' acts as a brake on the conversation, as the recipient of your conversation pauses to consider the context – the situation, perspective, or circumstance – in which they are referring to AI.

If the conflict is particularly serious, ask your question but without mentioning the particular subject of contention.

Asking a specific question will get you a specific answer. However, being intentionally vague followed by a pause, and then waiting, will allow you to gain much more information. Make your question 'open-ended' but with a pause and wait. For example, "Can you help me to understand why you feel that way?" Or "Help me understand why you think I am not doing my job properly." Or "Can you explain to me why you talked across me at the last meeting?" After asking questions like these, pause and wait.

The sixth strategy is to be prepared – especially for unpredictable behavior. With normal everyday behavior, we can predict a great deal. We say 'hello' and we expect a response. Unpredictable behavior calls for more 'defensive behavior', akin to the driving behavior known as 'defensive driving'.

Anticipation is your key tool in 'defensive driving'. For example, you need to react quickly when a car changes lanes without warning. Anticipation is also your key tool in managing unpredictable behavior. Prepare a set of proven responses to a series of unpredictable behaviors. Rehearse your reactions. Trust your intuition because it is usually right. Indeed, it may be the only warning you'll get that something is not quite as it should be.

The next strategy is to use action words and verbs. When you use action words, you sound assertive and confident. You spur others to action. They are instant in their impact and are of themselves an immediate call to action. Use verbs that have a clear meaning, such as 'evaluate', 'manage', and 'advise'. These immediately make clear what action is taking place.

The eighth strategy is to match another's perspective. This enables you to accurately understand their mindset and the environmental conditions that led them there. Your aim is to acquire a perspective and not just stick to your own certain perspective.

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Another strategy is to avoid making others feel manipulated or pressured. Be aware of the signals you are sending – and any negative signals that you are receiving. To be successful at effective and influential communications, you need to understand the four human behaviors: aggressive, passive, passive-aggressive, and assertive.

Let's begin with aggressive people. They aim to satisfy their own needs first, rather than other people's needs. Passive people, on the other hand, put other people's needs before their own. Passive-aggressive people find it difficult to assert themselves directly, and may often feel powerless or build up resentment against others. Assertive people, however, feel good about themselves and help others to feel good too.

Good communicators are assertive. They practice and hone their communication skills by approaching each task and having the courage and self-confidence to discuss, argue, and negotiate about anything. They are not afraid to express their opinion and advocate for it. However, they do not manipulate or pressurize people. They are simply being assertive.

A tenth strategy is to use negative assertion or negative enquiry. While communicating, being negative is considered to be a bad thing. However, there are two very powerful types of verbal negativity that can be applied to very positive effect in your communications. These are negative assertion and negative enquiry.

Let's look at negative assertion first. This skill enables you to state something negative about yourself, and own your weaknesses and mistakes assertively.

Suppose someone makes a fair criticism of you, or perhaps your company. For example, "Your product is too expensive." You could agree with them and say, "Yes, it is indeed expensive." You are being honest and could benefit from this criticism. The critic in turn knows that you have listened and are considering what they have said.

However, you can take this further. You could agree with the statement and then turn it into a positive. For example, you might say, "Yes, it is expensive. However, it is a best-in-class product and has been proven to last longer than competitor products." This is very powerful and, as often as not, your critic will be temporarily disarmed by this response.

Next, what is negative enquiry? This skill allows you to invite criticism, so that you can find out precisely why someone is angry, displeased, or critical of something you have said or done. It is called negative enquiry because you ask specific questions which could result in you hearing something negative about yourself.

For example, you might ask, "How can I improve my performance at meetings?" or "What do you not like about my work?" The good news is that with this approach, you will soon be in a position where you have more knowledge and can respond more accurately to the given situation.

Both of these types of verbal negativity are useful tools to have in your communication toolkit when honing your communication skills.

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